

FINANCIAL MANAGEMENT TRAINING AND DEVELOPMENT PLAN SUMMARY

The objective and goal of the training program is to provide a means whereby employees can continuously upgrade their skills and abilities to effectively administer the department's financial operations, and, receive recognition for their efforts at improving.

1. All individuals enrolled in the program prepare annual IDPs and forward copy of IDPs to the Program Training Coordinator.
2. The IDPs are updated annually, show the current progress of the enrollee, and show the actions needed to complete the IDP.
3. There are three levels to the training program: Level 1, GS-5/7/9/11, Level 2, GS-12/13, and Level 3, GS-14/15. Each level has continuing education requirements.
4. To receive Level 2 certification the enrollee first completes Level 1.
5. Employees need not complete Levels 1 & 2 to receive Level 3 certification. However, the enrollee should be a GS-14 or higher, and have a minimum of six years government financial management experience or government financial management related experience such as auditor, management analyst, program analyst, contract specialist, etc., and complete Level 3 training requirements to receive Level 3 certification.
6. Enrollees may request credit for applicable prior training received before implementation of the program.
7. Enrollees may request credit for training that is comparable to that in the plan. A course syllabus should accompany the request.
8. All self-study courses and accounting classes require a minimum passing score of 70% to receive credit.
9. At the end of each calendar year the Program Training Coordinator sends to each bureau and office a report detailing the progress of their employees in the program.

MAJOR COMPONENTS OF THE FMTDP

1. STANDARD CURRICULA OF DEVELOPMENT ACTIVITIES
2. REQUIREMENT FOR INDIVIDUAL DEVELOPMENT PLANS (IDP)
3. THREE LEVELS OF PROFICIENCY
4. FORMAL CERTIFICATION PROGRAM
5. REPORTING AND REVIEW PROCESSES
6. CENTRAL REFERENCE LISTING FOR TRAINING MATERIALS
7. FLEXIBILITY

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FINANCIAL MANAGEMENT TRAINING AND DEVELOPMENT PROGRAM
DEVELOPMENTAL CURRICULUM LEVEL 1
GRADES 5/7/9/11
DEPARTMENT OF INTERIOR

DEVELOPMENTAL OBJECTIVES	WORK EXPERIENCE/ON-THE-JOB TRAINING	CORE CURRICULUM	PROFESSIONAL OBJECTIVES
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1. Understand, develop, and apply accounting and budgeting principles, concepts, and practices of Federal government and DOI activities, including the preparation, and analysis of financial reports. A. Basic and continuing education B. Government and DOI policies and procedures	Rotational assignments to at least two of the following functions: -Administrative Control of Funds -Cash Management -Basic DOI Accounting -Budget Formulation -Budget Execution -Budget Review and Analysis and Validation -Monthly/Yearly Accounting and Budget Cycle	A ¹ -Federal organization and missions A-DOI organization and missions A-Basic DOI Accounting A-Basic DOI Budgeting A-Budget Execution and Validation A-Budget Formulation A-Budget Review and Analysis A-Appropriation Law A-Standard General Ledger A-Financial Reporting A-Cost Accounting A-DOI Basic Procurement A-GAO Titles 2,6, & 7 A-OMB Circulars A-11 & 34 A-Government Fund Accounting B ² -Federal Financial System (FFS) B-ABACIS B-Basic Statistics B-Basic Computer Science B-Treasury Financial Manuals B-Accounting Principles I B-Accounting Principles II B-Auditing	College Degrees (BS/BA, MBA, etc.) Professional Licenses and Certifications: CPA Certified Internal Auditor (CIA) Certified Management Accountant (CMA) Certified Information Systems Accountant(CISA) Certified Management Accountant (CMA) Professional Organizations: AGA, IIA, AICPA, IMA, CFE, AABPA(American Association of Budget and Program Analyst), etc. Certificate of Completion bestowed by Office of Financial Management on Completion of Level 1
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FINANCIAL MANAGEMENT TRAINING AND DEVELOPMENT PROGRAM
DEVELOPMENTAL CURRICULUM LEVEL 1
GRADES 5/7/9/11
DEPARTMENT OF INTERIOR

DEVELOPMENTAL OBJECTIVES	WORK EXPERIENCE/ON-THE-JOB TRAINING	CORE CURRICULUM	PROFESSIONAL OBJECTIVES
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¹A designates the core curriculum that an employee must successfully complete to receive the Certificate of Completion and the designation Bureau Certified Financial Manager from the Office of Financial Management

²B is the elective courses. B courses can also be used for CPE. At Level 1, enrollees who have not had accounting I and II must select accounting I and II as their B electives. To maintain certification the employee should acquire 40 hours of CPE every two years.

2. Understand the mission and functions of the Federal government and the Department of Interior	On-the-job experiences which enhance employee's understanding of the policies and procedures associated with their assignments. Receive mentorship from subject matter expert/supervisor/knowledgeable employee	B-Congressional Review Course as it relates to working of Congress and the Bureaus	
3. Work with personal computers (PCs) and the local FFS/ABACIS Information System	Demonstrated Experience using PC software: -wordprocessing -database -spreadsheet -network Demonstrated experience with and knowledge of local FFS/ABACIS	PC Courses: B-using DOS B-wordperfect B-dbase, paradox, etc. B-lotus, excel, etc. B-novell, NT, OS2 B-FFS/ABACIS B-Mainframe	Proficiency with FFS/ABACIS
4. Communication	Writing Assignments Briefing Assignments	B-Introductory Writing B-Introductory Briefing	Toastmasters

FINANCIAL MANAGEMENT TRAINING AND DEVELOPMENT PROGRAM
DEVELOPMENTAL CURRICULUM LEVEL 2
GRADES 12/13
DEPARTMENT OF INTERIOR

DEVELOPMENTAL OBJECTIVES	WORK EXPERIENCE/ON-THE-JOB TRAINING	CORE CURRICULUM	PROFESSIONAL OBJECTIVES
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1. Understand, develop, and apply accounting and budgeting principles, concepts, and practices of Federal government and DOI activities, including the preparation, and analysis of financial reports. A. Basic and continuing education B. Government and DOI policies and procedures	Rotational assignments to functions not achieved during time at Level 1: -Administrative Control of Funds -Cash Management -Basic DOI Accounting -Budget Formulation -Budget Execution -Budget Review and Analysis and Validation -Monthly/Yearly Accounting and Budgeting Cycle	A-FMFIA A-Inventory and Property Accounting A-Advanced Budget Analysis A-Financial Management Procedures and Functions A-FAR Overview A-Basic Elements of Property Management A-Financial Stmt. Prep. A-CFO Act B-Advanced Accounting B-Intermediate Statistics B-Collections other than debt	Attend AGA Symposiums Attend DOI Financial Management Conference Attend other seminars and financial management conferences Designation as Bureau Certified Financial Manager thru Office of Fin. Mgmt.; cannot be bestowed on employee until Level 1 completed ³
2. Understand mission and functions of the Federal Government and the Department of Interior	Budgeting and financial management experiences through details, special projects, taskforces, etc.	B-Yellow Book Standards	Execute Budget Operations Execute Financial Management Operations
3. Work with personal computers (PCs), and local FFS/ABACIS	Demonstrates knowledge of ADP systems and be able to test systems	B-FFS/ABACIS	Be able to communicate system problems to staff and develop system solutions

FINANCIAL MANAGEMENT TRAINING AND DEVELOPMENT PROGRAM
DEVELOPMENTAL CURRICULUM LEVEL 2
GRADES 12/13
DEPARTMENT OF INTERIOR

DEVELOPMENTAL OBJECTIVES	WORK EXPERIENCE/ON-THE-JOB TRAINING	CORE CURRICULUM	PROFESSIONAL OBJECTIVES
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³The enrollee's application for certification should be accompanied by a nomination from the Bureau CFO to the Office of Financial Management stating that the enrollee has met the requirements and should be designated a Certified Bureau Financial Manager. To maintain certification the enrollee should acquire 60 hours of CPE every two years.

4. Communication	Writing Assignments Briefing Assignments Plan/Conduct Meetings	B-Advanced Writing B-Interpersonal Relations B-Negotiations	Effective Communication Competent Toastmaster
5. Perform reviews and analyses	Participates in a leadership role in a formal CFO review	B-Problem Solving B-Flowcharting B-Performance Evaluation	Receive responsibility for planning and directing a project
6. Supervision and/or leadership	Lead/assist on a project or work assignment Act in absence of the supervisor	B-Leadership Development B-Managing Conflict B-Team Building B-Effective Supervision	Supervisor

FINANCIAL MANAGEMENT TRAINING AND DEVELOPMENT PLAN
DEVELOPMENTAL CURRICULUM LEVEL 3
GRADES 14/15
DEPARTMENT OF INTERIOR

DEVELOPMENTAL OBJECTIVES	WORK EXPERIENCE/ON-THE-JOB TRAINING	CORE CURRICULUM	PEOFESSONAL OBJECTIVES
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1. Understands, develop, and apply accounting and budgeting principles, concepts, and practices of Federal Government and DOI, including the preparation, and analysis of financial reports. A. Basic and continuing education B. Government and DOI policies and procedures	Special work project commensurate with grade and experience Rotational assignment to CFO office	A ⁴ -Strategic Plan A-Managing Design and Implementation of Federal Financial Systems A-Managerial Accounting in the Federal Government A-Management vs. Internal Controls A-Grants Management A-Federal Financial Accounting A-Financial Analysis A-Budget Process and Execution A-Research Methodology A-GPRA A-GMRA A-Review of Appropriation Law B-Re-engineering: Federal Financial Manager's Role B-Ethics	Designation by the Department CFO as a DOI Certified Financial Manager (must have minimum of six years of financial management /budgeting/auditing experience, completed core curriculum and be nominated by Office of Financial Management to Department CFO for certification. To maintain certification employee should complete 80 hours of CPE every two years)
2. Understand the mission and functions of the Federal Government and Department of Interior	Attend formal budget review	B-The mission of the CFOs at DOI B-Current Trends in Accounting	

FINANCIAL MANAGEMENT TRAINING AND DEVELOPMENT PROGRAM
DEVELOPMENTAL CURRICULUM LEVEL 3
GRADES 14/15
DEPARTMENT OF INTERIOR

DEVELOPMENTAL OBJECTIVES	WORK EXPERIENCE/ON-THE-JOB TRAINING	CORE CURRICULUM	PEOFSSIONAL OBJECTIVES
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⁴A Core Curriculum, plus a minimum of six years government financial or financial related work experience and be GS-14 or higher is required. No requirement for functional assignment.

3. Perform reviews and analyses	Be a member of a review team for FMFIA, CFO, etc.	A-Decisionmaking A-Program Performance Measures	
4. Communication	Plan and conduct executive and staff briefings Effectively communicate with senior officials from outside the Department (GAO, OMB, Congress, and the Public) Effectively communicate with senior officials at DOI headquarters and outside the Department (GAO, OMB, Congress, Public)	B-DOI Speaking Skills for Managers B-Interpersonal Relations B-EEO Training	Publishing Professional Articles Conference Speaker for Professional Organization
5. Perform supervision and/or leadership	Rotational assignment to a section chief, branch chief, division chief position Lead on a project or work assignment Participate in personnel selections	B-Current Trends in Supervision and Management B-Managing Organizational Change B-Building a Management Team A-Leadership A-Personnel Management for Supervisors	OPM Executive Seminar Center Training DOI SES Candidate Program Branch/Division Chief Deputy CFO